

## **ASSISTED LIVING SURVEY & LICENSURE RESTRUCTURING PROJECT WORK GROUP**

**Meeting Date:** July 30, 2004  
**Meeting Location:** Medicaid Offices, 3232 Elder Street, Boise, Idaho

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**Participants:** Chris Baylis, Nicole Martin, Debora Corbin, Robert Vande Merwe, Cathy Hart, Debby Ransom, Ione Springer (IBOL), Pat Gooding (Administrator) Lorri Watson (R.N., Administrator), Shyla Smith (Pharmacy Nurse), Suzie Hanks

**Sponsor:** Randy May

**Facilitators:** Marsha Bracke, Susan Hayman

**Support Staff:** Steve Millward

**Observers:** Brent Brocksome, Rep. Kathie Garrett, Keith Fletcher, Kathy Fencel, Wendy Shell, Kim Heuman, Bev Barr, Pat Aitchison, Debby Sholley, Kathi Brink, Keith Fletcher,

### **Meeting Objectives:**

1. Provide final review, refinement and decision on Task List assignments and checklists.

### **Handouts:**

- Agenda
- Activities Checklist
- Behavior Management Checklist
- Hourly Adult Care Checklist
- Environment and Fire/Life Safety Checklist
- Enforcement Slides from Randy May's 6/8/04 Joint Councils Presentation
- The Path Forward – Timeline
- Task List

### **Decisions:**

1. The workgroup approved the Activities Checklist as modified.
2. The workgroup approved the Behavior Management Checklist as modified.
3. The workgroup approved the Hourly Adult Care Checklist as modified.
4. The workgroup approved the Environment and Fire/Life Safety Checklist as modified.

### **Action Items:**

1. Steve to send survey guide to new workgroup members by August 2, 2004.
2. Steve to send URL to new website to workgroup (include new) by August 2, 2004, or as soon as it is available.

### **Public Comments:**

*See Attachment A*

**Flipchart Notes:**Decision – Activities Checklist (as modified)

<b>Name</b>	<b>Agree</b>	<b>Disagree</b>
Ione Springer	X	
Chris Baylis	X	
Nicole Martin	X	
Shyla Smith	X	
Suzie Hanks	X	
Debora Corbin	X	
Robert Vande Merwe	X	
Cathy Hart	X	
Lorri Watson	X	
Pat Gooding	X	
Debby Ransom	X	

Decision – Behavior Management Checklist (as modified)

<b>Name</b>	<b>Agree</b>	<b>Disagree</b>
Ione Springer	X: with clarifications	
Chris Baylis	X	
Nicole Martin	X	
Shyla Smith		X: pending clarifications
Debora Corbin	X: with clarifications and monitoring is not burdensome	
Robert Vande Merwe	X	
Cathy Hart	X	
Lorri Watson	X	
Pat Gooding		X: pending clarification of behavior plan
Debby Ransom	X	
Suzie Hanks	X	

Decision – Adult Hourly Care Checklist (as modified)

<b>Name</b>	<b>Agree</b>	<b>Disagree</b>
Ione Springer		X: #8 – don't agree with licensing cap. NSA/UAI – should be covered under initial assessment
Chris Baylis	X: look at Medicaid provider agreement regarding NSA/UAI	
Nicole Martin	X	
Shyla Smith	X	
Debora Corbin	X: check to ensure all statutes/rules are covered in checklist	
Robert Vande Merwe	X	

Cathy Hart	X	
Lorri Watson	X: need to be more specific on #3	
Pat Gooding	X: need to be more specific on #3	
Debby Ransom	X	
Suzie Hanks	X: concerned about paperwork	

#### Decision – Environment and Fire/Life Safety Checklist (as modified)

Name	Agree	Disagree
Ione Springer	X	
Chris Baylis	X	
Nicole Martin	X	
Shyla Smith	X	
Suzie Hanks	X	
Debora Corbin	X	
Robert Vande Merwe	X	
Cathy Hart	X	
Lorri Watson	X	
Pat Gooding	X	
Debby Ransom	X	

#### Definitions List

- Inappropriate Behaviors
  - When is it “inappropriate” and when is it “habit”
- Adequate Lighting
- Proper Ventilation
- Hazardous Quantity
- Easily Operated Gates (Environment and Fire/Life Safety Checklist)
  - Dementia residents
- Portable Heating Devices
  - clarify difference from electric blankets, pads, etc.
- Special Knowledge (Environment and Fire/Life Safety Checklist #26)
  - Check Programs of Care
- Protect-in-Place Building

#### Enforcement

##### *What else needs to be added/addressed*

- Clarify if 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> offense is for the same core issue, or a different core issue?
  - There are 7 core issues. If the deficiency is any of these, it would be cumulative. Needs to be clarified in description (“any core issue” added behind “successive surveys”).
- Should be more tools than repeat surveys for offenders (different remedies).
- Technical Assistance? Define/identify what these are.
- Concerned that 2<sup>nd</sup>, 3<sup>rd</sup> offence do not have rapid enough response time.
- Clarify “standard surveys at 6 months and again at one year.” – suggested language (3<sup>rd</sup> offense).

## **Parking Lot:**

1. Regarding Activities Checklist: Clarify documentation level for activities – Records issue (calendars? Ensure flexibility, define what documentation should look like). Admissions agreement? NSA? [“Provide opportunities for activities”] – noted in activities checklist.
2. Regarding Behavior Management Checklist: Refusal of care (“inappropriate behavior” connection?)
3. Regarding Behavior Management Checklist: Nursing review of behavior plans? (see Nursing Checklist?) Who is most appropriate to write and evaluate behavior plans?
  - Put this in appropriate checklist.
  - Ensure monitoring of this is not burdensome.
4. Regarding Behavior Management and Nursing Checklists: Cross reference nursing concern about workload regarding behavior plans and other additions/potential additions to responsibilities.
5. Regarding Hourly Adult Care Checklist: Note that endorsements (Programs of Care) apply to hourly adult care clients. (should apply?)
6. Include “code status” in NSA/UAI.
7. Regarding Environment and Fire/Life Safety Checklist: Page 1 references need to be updated.
8. Regarding Environment and Fire/Life Safety Checklist: Clarify #11 → “use for sleeping...”
9. Regarding Environment and Fire/Life Safety Checklist: Reconcile smoking allowances with new Idaho smoking statutes.
10. Staffing at night – issue with potential for abuse (e.g., unexpected visits).
11. Up and awake staff at night with Programs of Care?
12. How to identify when individuals are not appropriate for Assisted Living Facilities.

## Designated Reviewers

- Co-Ad, Inc. (Corinna Wolfe, Jim Baugh)
- IHCA
- Debora Corbin
- Shyla Smith IHIP
- Cathy Hart
- Pat Gooding
- Lorri Watson
- Kathi Brink
- Ione Springer
- Keith Fletcher

### IDALA Issues Meeting

- IHCA
- Debora Corbin
- Shyla Smith
- Cathy Hart
- Pat Gooding
- Lorri Watson
- Ione Springer
- Representative Kathie Garrett
- Notify both Corinna Wolfe and Jim Baugh

### September 8<sup>th</sup> Meeting Participants

- Everyone at the table today
- Invite IDALA
- Send Jim Baugh notice, please

### **Meeting Evaluation**

<b>Positive</b>	<b>Change</b>
Overall, very positive experience. x2	Need to remember that others will “freak out” when they see this for the first time – need to hang in there!
Very positive experience – nice to be reminded of the positive aspects of the Department.	There may be concerns yet that we haven’t thought of.
Learned a lot. x2	Concerns with smaller facilities and the effect on them.
Lot of good things out of this process. Look forward to see it come into effect.	Expect legislative bumps.
Thank people who stepped up today.	Hope it gets through legislature.
Interesting. Opportunity to clarify things based on my background.	Need to do a great deal of communication before legislature.
“Growing experience.”	Lot more to do.
Reflects volume of work accomplished.	
Lots of give and take on painful issues – wonderful job.	
A lot accomplished in short time.	
We’ve come a long ways – communication has improved.	
Great job – appreciate facilitators.	
Not a lot of states would let providers help write rules. Kudos to the Department.	